



Barnes Fall 2023 Round 12 ARPA Grant #1: Homesharing Improvements Scoring Matrix

Thresholds: Staff					
Section I: Minimum Standards: Required Elements (Yes/No)		#1. Complete Application	#2. Financials/Audit	#3. Organizational Information	#4. Administration/Developer Fee
Required Elements	Yes/No Each of these items must be checked off as a YES in order to be considered for funding.	Application is complete. All questions are answered thoroughly throughout the entire narrative. All uploads required for the relevant category must be attached, including Affirmative Marketing Plan, Universal Design Checklist, and Energy Efficiency and Sustainability Checklist. - Applicant has extensive experience working with older adults.	For organizations with annual budget above \$500,000: - Audit for lead applicant organization completed within the past 24 months with no findings. For organizations with annual budgets of \$200,000-\$500,000: - Financials completed by independent CPA. Organizations must show positive operational cash flow and positive net worth.	Organizational Information is complete. Lead Organization is 501c3 nonprofit, all partners listed. No part of leadership team is involved in a lawsuit or has outstanding claims for safety violations or wage payments. Details will be required in Question 5.	Portion of administration (developer) fee to be paid by Barnes is no more than 20% of the project's total Barnes grant request. Details will be required in Question 7.
NOTE: If these criteria are not met, staff will not advance the application for further review.					
Section II: Staff-Scored Elements		Exceptional 10 points	Strong 7 points each	Needs Improvement 5 points each	Missing Information 3 - 0 points each
Organization	#5. Team Experience and Capacity	At least one member of shared housing improvement team has deep experience (11+ yrs) with significant rehab, or more than two have 5+ years each. - Team demonstrates substantial experience with improvements to homes of various scale, including ADUs (accessory attached dwelling units) or team is partnering with organization with substantial experience in same area. - Written letter of commitment or MOU from proposed partner is included in upload. - The team has significant experience providing services to older adults and has strong partnerships within the older adult service network. ___ of projects completed over ___ years	At least one member of the shared housing improvement team has (5+ years) building experience with similar housing. The team has demonstrated experience in providing improvements to homes of various scale, including ADUs or the team is partnering with an organization that has experience in providing such improvements. The team has significant experience providing services to older adults. ___ of projects completed over ___ years	At least one member of the shared housing improvements team has some (3+ years) building experience with providing similar updates to housing. - The team has experience with providing rehab and repairs but limited experience with providing more substantial improvements, including ADUs. -The team does not propose partnering with an organization that has expertise in providing such improvements. - The team has moderate experience providing services to older adults. ___ of projects completed over ___ years	3 pts: Only one member of the shared housing improvement team has less than five years of (<3 years) building experience with similar housing and they are not partnering with an experienced GC, developer, and/or nonprofit 0 pts: There is no development experience on the development team and there is not a partnership with an established GC, developer, or nonprofit. - The development team has no experience providing rehab and repair services to older adults. ___ of projects completed over ___ years

Project Funding	#6. Funding Sources and Uses	<p>Barnes request is <u>no more than 50%</u> of total project budget and organization has <u>committed funding for remaining balance</u>. Funding sources may include private loan, non-federal match, and/or organizational equity. Letters of commitment or similar confirmations attached in the upload.</p> <p>The funding will be used for one or more of the following three purposes:</p> <ol style="list-style-type: none"> 1) To enable a space of the home to be rented through the Homesharing program; 2) To create a safe space for on-site care; and/or 3) To accommodate for multi-generational housing 	<p>Barnes request is <u>more than 50%</u> of budget and organization has <u>committed funding for remaining balance</u>. Funding sources may include private loan, non-federal match, and/or organizational equity. Letters of commitment or similar confirmations attached in the upload.</p> <p>The funding must be used for one or more of the following three purposes:</p> <ol style="list-style-type: none"> 1) To enable a space of the home to be rented through the Homesharing program; 2) To create a safe space for on-site care; and/or 3) To accommodate for multi-generational housing 	<p>Barnes request is <u>no more than 50%</u> of budget but organization only has <u>committed funding for 40% of project</u>, with <u>tentative funding for remaining balance</u>. Funding sources may include private loan, non-federal match, and/or organizational equity. Letters of commitment for committed funds are attached, plus explanation of status for tentative funding.</p> <p>The funding must be used for one or more of the following three purposes:</p> <ol style="list-style-type: none"> 1) To enable a space of the home to be rented through the Homesharing program; 2) To create a safe space for on-site care; and/or 3) To accommodate for multi-generational housing 	<p>3 pts: Barnes request is <u>no more than 50%</u> of budget, but organization has only <u>tentative funding for remaining balance</u>.</p> <p>0 pts: Barnes request is <u>more than 50%</u> of budget, and organization has only <u>tentative funding</u> for remaining balance or Funding will not be used for at least 1 of 3 approved purposes: 1) To enable a space of the home to be rented through the Homesharing program; 2) To create a safe space for on-site care; and/or 3) To accommodate for multi-generational housing</p>
Project Funding	#7. Administration/ Developer Fee	<p>Portion of developer/admin fee paid by Barnes is equal to or less than 20% of the project's total request from Barnes.</p> <ul style="list-style-type: none"> - Higher points may be earned by projects where the Developer Fee is 10% or less. - Applicant provides thorough detail on the use of the fee. - Applicant has secured estimates for committed partnerships, such as design consultants. 	<p>Portion of developer/admin fee paid by Barnes is less than or equal to 20% of the project's total grant request from Barnes.</p> <ul style="list-style-type: none"> - Applicant provides detail on the use of the fee. - If applicable, applicant provides some detail on estimates for committed partnerships. 	<p>Developer/admin fee paid by Barnes is 20% of the project's total grant request from Barnes.</p> <ul style="list-style-type: none"> - Applicant provides little to no detail on the uses of the developer/admin fee. 	<p>0 pts: Developer/admin fee is greater than 20% of the project's total grant request from Barnes and paid by Barnes and/or Proposal fails to provide a clear budget.</p>
<p>Total Required Elements Sections I & II points available: 30. Applicants must meet threshold of at least 15 points available to continue to Section III: Evaluation Criteria (Scored).</p>					
<p>External Review Committee</p>					
<p>Section III: Evaluation Criteria (Scored)</p>		<p style="text-align: center;">Exceptional 15 points</p>	<p style="text-align: center;">Strong 10 points</p>	<p style="text-align: center;">Needs Improvement 7 - 5 points</p>	<p style="text-align: center;">Missing Information 3 - 0 points</p>
Project Approach	#8. Program Approach	<p>Scope of work includes assisting older adults by making repairs and/or improvements to their existing homes to create additional living space.</p> <p>Applicants will create ADUs utilizing:</p> <ul style="list-style-type: none"> - feedback from the resident in design decisions before, during, and after the construction period - follow-up during the warrantee period to ensure work standards - There is a clear process for homeowner engagement. - Applicant provides substantial detail on how approach for significant improvements, such as ADUs, would differ from minimal repairs. - Applicant selection process is detailed, includes outreach, prioritizes diversity, and involves multiple trusted partners serving older adults. - Investment per unit meets grant policy guidelines - Proposal clearly demonstrates how all funds will be expended by 12/31/26. 	<p>Program will serve older adults age 62+, homeowners, 80% AMI or less</p> <p>Scope of work includes established construction standards and feedback loops for the resident before, during, and after the construction period.</p> <ul style="list-style-type: none"> - There is a rough process for homeowner engagement. - Applicant provides detail on how approach for significant improvements, such as ADUs, would differ from minimal repairs. - Applicant selection process is detailed and includes outreach. - Investment per unit meets grant policy guidelines 	<p>Program will serve older adults age 62+, homeowners, 80% AMI or less</p> <p>Scope of work includes information on minimal rehab and repairs but provides minimal detail on the level of improvements that may be required to provide additional living spaces.</p> <ul style="list-style-type: none"> - Applicant provides little information about how the resident will be engaged in the process. - Applicant selection process lacks detail and does not include outreach. - Investment per unit meets grant policy guidelines 	<p>0 pts: Only general information about the rehab scope is provided with little information about selecting residents who are older adults age 62+, homeowners, 80% AMI or less or no information is provided about the scope of program work or - Investment per unit does not meet grant policy guidelines</p>

<p>Project Approach</p>	<p>#9. Marketing and Outreach</p>	<p>Outreach for potential homeowners includes</p> <ul style="list-style-type: none"> - older adults age 62+, homeowners, 80% AMI or less - at-risk families - an affirmative marketing plan and collaboration with more than one trusted community organization. - The outreach plans described by the applicant reflect a strong understanding of the target population and the diverse needs of older adults. - The outreach plan provides robust details on how the applicant will reach diverse populations. - Organization shows a strong commitment to understanding the current community needs through assets such as a community needs assessment, survey, or other such data analysis. 	<p>Outreach for potential homeowners includes an affirmative marketing plan, collaboration with one or more trusted community organization with some data provided, but prior community analysis is limited or not available.</p> <ul style="list-style-type: none"> - The outreach plans described by the applicant include some detail on reaching diverse populations and reflects an understanding of the target population (older adults), but the plan could be expanded. 	<p>Outreach for potential homeowners includes</p> <ul style="list-style-type: none"> - an affirmative marketing plan or collaboration with one or more trusted community organization with some data provided, but data is conveyed in generalizations or not included. - The data shared is not specific to older adults. - The outreach plans described include limited or no details on reaching diverse populations. 	<p>2 pts: No affirmative marketing plan is included but there is information about collaboration efforts with trusted community organizations serving older adults or prospective outreach.</p> <p>0 pts: The outreach plans described by the applicant are inadequate and not specific to older adults.</p>
<p>Project Approach</p>	<p>#10. Participant Engagement Details</p>	<p>Homeowner education about the rehab, lien requirement, affordability window, and homeownership is provided to people of diverse backgrounds and experience.</p> <ul style="list-style-type: none"> -Community recruitment includes diverse outreach to community groups and trusted community advocates for older adults. - Homeowners are offered resources for continued support. - Applicant demonstrates strong understanding of resources available for older adults and provides detail on how to connect homeowners with such resources. - Applicant provides robust detail on how information about the Homesharing program will be shared. 	<p>Homeowner education about the rehab, lien requirement, and homeownership is provided to people of diverse backgrounds and experience.</p> <ul style="list-style-type: none"> - Community recruitment includes diverse outreach to community groups and trusted community advocates for older adults. - Homeowners are offered resources for continued support. - Applicant provides details on how information about the Homesharing program will be shared. 	<p>Homeowner education about the rehab, lien requirement, and homeownership is provided to people of diverse backgrounds and experience.</p> <ul style="list-style-type: none"> - Homeowners are offered resources for continued support. - Applicant provides limited details on how information about the Homesharing program will be shared. 	<p>Homeowner education about the rehab, lien requirement, and homeownership is provided to people of diverse backgrounds and experience.</p> <ul style="list-style-type: none"> - There is no follow-up or continued support resources offered as part of the homeowner education. - Applicant provides no details on how information about the Homesharing program will be shared.

Project Approach	#11. Quality Design	<p>Proposed projects will incorporate thoughtful, appealing design and be built with high-quality, energy efficient products and systems.</p> <p>Barnes-funded designs should be sustainable, high-quality, and considerate to neighborhood character, changes, and expectations.</p> <p>Project is sensitive to Universal Design and visitability standards and includes criteria from the Universal Design Checklist.</p> <p>Meeting a larger number of criteria will be considered in the scoring matrix. The checklist should be submitted with application.</p>	<p>Project is sensitive to Universal Design and visitability standards and includes some criteria from the Universal Design Checklist. The checklist is submitted with application.</p>	<p>Project includes some inclusive and visitability standards but does not address any Universal Design Checklist items, or does not show which UDC items have been addressed.</p>	<p>No inclusive or visitable design aspects are included in project proposal.</p>
Project Approach	#12. Sustainability & Resilience	<p>Applicant goes well above and beyond requirements associated with sustainability and resiliency by placing a clear emphasis on sustainable building design, operation, and owner experience.</p> <p>Project includes criteria from the Energy Efficiency & Sustainability Checklist, plus 3 or more criteria such as</p> <ul style="list-style-type: none"> A) Energy efficient repairs B) Sustainable policies on construction waste C) High performing and sustainable building materials 	<p>Applicant meets requirements associated with sustainability and resiliency such as sustainable building design, operation, and owner experience.</p> <p>Project includes criteria from the Energy Efficiency & Sustainability Checklist, plus 2 criteria such as</p> <ul style="list-style-type: none"> A) Energy efficient repairs B) Sustainable policies on construction waste C) High performing and sustainable building materials 	<p>Applicant addresses sustainability and resiliency but does not use Energy Efficiency & Sustainability Checklist or</p> <p>Project includes criteria from the Energy Efficiency & Sustainability Checklist, plus 1 criterion such as</p> <ul style="list-style-type: none"> A) Energy efficient repairs B) Sustainable policies on construction waste C) High performing and sustainable building materials 	<p>Proposal does not include evidence of sustainability and resilience measures beyond what is required in checklists, or Applicant does not commit to items required in checklists.</p>
Total Points available for Section III: 75					

Total Points available for Sections I, II, and III before Bonus Points Section: 105 Applicants must have a cumulative score of at least 50 points before bonus points to be considered for funding.					
Section IV: Bonus Points (Scored)		Exceptional 5 points	Strong 4 points	Needs Improvement 3-2 points	Missing Information 0 points
Bonus	Diversity, Equity, Accessibility & Inclusion	<p>Applicant goes above and beyond representation in terms of equity. Board and staff are representative of the communities they serve.</p> <p>Proposal includes 3 or more examples of additional efforts for DEAI practices such as:</p> <ul style="list-style-type: none"> - Innovative incorporation of user experience or lessons learned from previous projects - Policies promote resident dignity - Subcontracting promote inclusion beyond representation - Narrative shows a commitment to underrepresented people and minority groups that have historically been excluded from the benefits of housing policies - Diverse outreach to community groups including partnerships with culturally competent organizations with language access for homeowners - Number of accessibility points for differently-abled persons See grant policy for detail. 	<p>Applicant goes above and beyond representation in terms of equity. Board and staff are representative of the communities they serve.</p> <p>Applicant includes some measures of DEAI work beyond representation in terms of equity, including 2 examples of additional efforts for DEAI practices.</p>	<p>Applicant has some DEAI measures in place that meet basic standards of inclusion including but not limited to:</p> <ul style="list-style-type: none"> A) Staff/board training B) Moderate representation through board or staff of the populations served C) Required zoning community feedback D) Some resident connection points (3 pts). <p>Proposal includes basic DEAI measures for limited minority representation or populations served (2 pts).</p>	<p>1 pt: Applicant has limited representative DEAI measures including but not limited to:</p> <ul style="list-style-type: none"> A) Little or no accessibility B) Staff or board representation of minority/women is not significantly representative of the populations served. <p>0 pts: There are no visible DEAI measures taken by the applicant organization outlined by the provided narrative.</p>
Bonus	Deeply Affordable Housing	10% or more of the homeowners assisted through the ADU Homesharing program are at or below 30% AMI.	5% or more of the homeowners assisted through the ADU Homesharing program are at or below 30% AMI.	Less than 5% of homeowners assisted through the ADU Homesharing program are at or below 30% AMI.	No homeowners assisted through the ADU Homesharing program are at or below 30% AMI.
Bonus	Healthy Communities	<p>Applicants demonstrate how to achieve positive impacts for older adult homeowners through creating Additional Dwelling Units (ADUs):</p> <ul style="list-style-type: none"> - Increased sense of security - Reduced social isolation while aging in place - Enhanced economic security - Strengthened inter-generational connection <p>For highest scores, applicants will incorporate the multitude of benefits research has shown for inter-generational living.</p> <p>Improvements and repairs needed may vary in scope depending on the needs of the household, but applicants describe improvements that will allow for additional safe and high-quality living spaces within the home.</p>	<p>Applicants demonstrate how to achieve positive impacts for older adult homeowners through creating Additional Dwelling Units (ADUs):</p> <ul style="list-style-type: none"> - Increased sense of security - Reduced social isolation while aging in place - Enhanced economic security - Strengthened inter-generational connection <p>Improvements and repairs needed may vary in scope depending on the needs of the household, but applicants describe improvements that will allow for additional safe and high-quality living spaces within the home.</p>	<p>Improvements and repairs needed may vary in scope depending on the needs of the household, but applicants describe improvements that will allow for additional safe and high-quality living spaces within the home.</p>	<p>Applicant does not address creation of ADUs, nor describe improvements to allow for additional safe and high-quality living spaces within the home.</p>
Total Points available for all Sections including Bonus: 120					